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FinancialPlanning

Retirement

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Reporter

Hello!

We just published the latest installment of The Ladder , a series that looks at how executives and leaders in the wealth management industry made it to where they are today — and what you can learn from them.

Peter Krull, partner and director of sustainable investing at Earth Equity Advisors, discussed how meeting his future wife — scientist Melissa Booth — and green architect Bill McDonough helped change the trajectory of his career.

I hope you'll check it out, along with the rest of this week's stories.

As always, thank you for reading. Talk to you next Wednesday!

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TOP STORIES

PROFESSIONAL DEVELOPMENT

The Ladder: Peter Krull's Ph.D and SRI moments

The partner and director of sustainable investing at Earth Equity Advisors says meeting two influential people in his life led him to a career in socially responsible investing.

- **Financial planning as a perk opens doors for advisors**
  This fringe benefit can take the weight off of the company's human resources department, allow employees to experience the benefits of financial planning and even allow advisors to prospect for new clients.
- **Former athletes can win big by tackling careers in financial advice**
  Professional athletes, who may have struggled financially for years, often suddenly come into large sums of money once they achieve their dreams.

That's where a financial advisor can help — especially one who is a former athlete.

- **Innovation Awards: Innovation in Lead Generation Technology — WEALTHAWK**
  WEALTHAWK is giving advisors data on prospects with "money in motion" events.
- **Reduce client regrets on retirement savings with these tips**
  Most Americans wish they had started saving for retirement sooner and that they hadn't withdrawn money early from retirement accounts, a recent study says.

Read the latest in Retirement

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In this webinar we'll discuss best practices for building a succession plan and how to approach buying or selling a firm.

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